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ABSTRACT

Fund raising strategies that take advantage of the ties alumni have with their graduating class are discussed in five articles. Topics include: organizing classes to promote fund raising, training volunteer alumni, stimulating class fund raising through competition and incentives, allocating staff time and resources, and using special reunion years to best advantage. Also considered are the role of class agents, the use of a class fund raising manual, senior class reunion gift programs, and financial concerns. According to Paula J. Faust in "Fund Raising through Class Association," class association means alumni are grouped according to the year in which they graduated. In "Class Fund Raising: The College Perspective," Janet G. Strahler suggests that peer pressure and direct classmate contact increase dollar totals and reliably increase fund-raising participation. Sherwood C. Haskins, Jr., in "Using Class Agents," suggests that it pays off to carefully select class agents, who write letters, collect information, and attend phonathons and school activities. In "The Capital Reunion Fund," Russell F. Carpenter proposes using two major reunions to conduct capital campaigns. Finally, Robert J. Kallin, in "Senior Class Reunion Gift Programs," discusses educating future alumni about alumni support. (SW)

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Using Class Agents in Fund Raising

Paula J. Faust, Editor

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Using Class Agents in Fund Raising

Paula J. Faust, Editor

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Paula J. Faust, Editor
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Chapter 1

FUND RAISING THROUGH CLASS ASSOCIATION

by Paula J. Faust

Year after year colleges, universities, and independent schools report that they receive more money from alumni than from any other single group. At most institutions the alumni fund is the major component of the annual fund, a vital source of operating dollars. Alumni are the primary group to whom we look for help with capital needs.

This handbook explores one way to organize alumni for fund raising and involvement. Class association means alumni are grouped according to the year in which they were graduated. A class year appears after each individual's name on all records; all alumni are automatically associated with a specific year.

Most institutions with strong class associations had those strong class associations long before they had fund raisers! The fund raiser simply adapted to an already clearly defined structure. This is especially true at private institutions.

Larger public institutions do not have the same traditions and their students may have stronger ties to a particular department or to a college within a university than to a class. It follows that organization by class is not the only way to go about the task of fund raising and may not always be the best way.

Synthesizing fund-raising approaches

Doug Wilson, vice president for university relations at Miami University, elaborates on the reasons this may be so.

> Fund raising, as we all know, is best accomplished on a personal basis. Knowing that, years ago private colleges and universities established annual giving programs based on graduating classes. The goal was simple: organize a volunteer structure within each graduating class to contact its members by letter, telephone, or both and personally ask for a gift. In addition, the institutions encouraged rivalries between the classes and fostered friendly competition in other ways.
>
> The programs have been enormously successful over the decades. Relatively small and manageable classes have lent themselves well to the personal touch, no pun intended, and friends calling friends has been an appealing and worthwhile approach.

During the early development of the class giving programs at private institutions, many public universities were small enough to accomplish the same goals. However, public university fund-raising programs at that time generally were not mature, often only a direct-mail-driven annual giving program usually closely associated with the alumni association. The all-purpose alumni secretary at a public university was more than busy running the alumni program, coordinating institutional public relations, and overseeing a modest annual fund.

By the 1960s, however, many public universities developed an interest in expanding their development programs. But in terms of developing gifts through a volunteer class structure, most did not pursue this for two reasons. First, several decades of momentum had been lost. It's much easier to organize each year's graduating class before they leave the campus than to pull together [illegible] operation 20 years after the sheepskins passed out.

Second, the size of the classes of many public institutions grew dramatically in the 1960s and 1970s. Classmates, in too many cases, simply didn't know each other. The special glue that bonds people together in smaller classes was not there as graduating classes ranged from 3,000 to 5,000 and often even more. In addition, the development office personnel that was needed to even try to organize these large numbers provided an expense that nearly all public universities were not willing to absorb.

As a result, public institutions have concentrated on other motivators including direct mail and phonathons to all graduates, giving clubs, planned giving programs as well as appeals to corporations and foundations, especially for research-oriented projects.

There is one way, however, in which public universities can use a class organization for fund-raising purposes. At Miami University, we call it our Senior Challenge Program. In a nutshell, we line up about 350 seniors who, in turn, approach up to 10 of their classmates personally and ask them to make a pledge to the campaign. Generally, several university-wide needs represent the goals of the campaign, but we also allow the seniors to more specifically earmark their gift if they wish. Seniors are encouraged to pledge a total of $75.00 to be paid over three years. Generally, they accept

this amount although we find that a number pay the entire pledge even before they leave the campus.

The results have been gratifying. Started in 1980, the totals have averaged about $100,000 per graduating class based on over 40 percent participation. The faculty and staff are most pleased with such generosity while the seniors are proud to leave behind such a nice present for the university. And, of course, the whole concept of supporting their alma mater through an annual gift is established immediately as the seniors enter the ranks of alumni.

The Senior Challenge Program at Miami University helps bridge the gap between no class-oriented fund raising at most public universities and the elaborate programs at many private institutions. Realistically speaking, it is about as close to fund raising by classes as a public university can get.

Re-building class structure

Certain ingredients must be present for a class-oriented program to be effective. In some instances where vital ingredients -- class officers, for example -- are missing they can be developed. Jerry Eckert, vice president for development at Millersville State College and formerly of Franklin and Marshall, explains how F & M rebuilt a class structure for fund raising.

In the late 1970s Franklin and Marshall College, with encouragement from the national alumni board, reactivated its somewhat dormant class organization. This was a difficult task since undergraduate class officers had not been elected since 1967, and records of class officers were sketchy.

A new list of class officers was compiled by reviewing all yearbooks from 1920-1967. The officers were contacted to renew their commitment and where spots were vacant, replacements were found. Previous reunion chairs were contacted to fill class positions. Undergraduate class elections were reintroduced in 1980 by an active student organization, the Alumni-Student Association. A class manual was developed and sent to all class officers.

Homecoming and Spring Reunions (50-year and older classes) have been strengthened through this effort and class officers meet a year in advance to plan their reunion. Working with the development

office, a class reunion giving program was begun in 1979 which has met with success in terms of money raised and increased attendance. Every two years class officers are invited to the college for a leadership conference. The Dean of Students' office works with the undergraduate classes in creating class identity and these officers are invited to all alumni board meetings. Further, they assist the alumni office with homecoming and spring reunions.

Each class has a president, vice president, reunion planning chair, reunion gift chair, secretary-treasurer, and a deferred gift chair for the 25-year and older classes.

A program such as this can be enormously useful in creating class spirit and a strong sense of class affiliation, both important ingredients for success in fund raising by class. Most advancement officers would argue against electing fund-raising volunteers. The best volunteers are themselves committed and generous donors who possess the ability to motivate others and the knowledge to accurately assess the gift potential of their classmates.

Relating to volunteers and prospects

Fund raising by class demands a large number of volunteers. Frequent and open contact with those volunteers is the best way to ensure success. If we get to know volunteers well, beyond a surface acquaintance, and allow them to know us well, it will be easy to transfer our enthusiasm, interest, and concern for the institution to them. If we are not involved in the lives of our institutions, how can we motivate others to be involved in them? Our jobs are much easier if we believe in our institutions. Sincerity is as hard to hide as it is to fake.

The late Harold J. Seymour was one of the first and remains one of the most well-respected fund-raising thinkers. In his book Designs For Fund Raising he said that if we raise friends, money will follow. Being a good advancement officer is a lot like being a good friend. We must take the initiative and think of reasons for contact with volunteers and prospects, listen to what they say, and respond promptly, thoughtfully, and honestly.

Seymour describes fund raising in terms of a tripod or three-legged stool, the three parts being:

1. consistent annual giving by all members of the constituency,
2. occasional capital campaigns, and

3. promotion of deferred giving through bequests and living trusts.

Annual giving is the backbone of institutional advancement. It is, first, a vital source of operating revenue. It is also a training ground: for donors and their habit of giving, for the identification and cultivation of capital prospects, and especially a training ground for volunteers. Finally, involvement in the organization of an annual fund is important training for advancement officers.

The annual fund gives us an opportunity to be in touch with every member of our constituency at least once every year. Through alumni funds we can communicate to our graduates a sense of responsibility for the future of our institutions. As those people charged with the task of seeking support for our institutions, we must work to go beyond simply taking advantage of good feelings about the place and attempt to cause prospects to understand and become committed to the "big idea" or mission of the institution.

Successful fund raising begins with a good place. It is difficult to motivate someone to support a place where they had a bad experience. The more we know about our institutions and educational issues, the greater our credibility will be with constituents and colleagues. Credibility with faculty and administrative colleagues can make a tremendous difference in ensuring a team approach. It is important that we think of ourselves as educators and that we take an active role in the lives of our institutions. That does not mean setting the educational priorities. It does imply an ability to discuss almost any institutional program or issue and an understanding of where our institution fits into the larger or national educational arena.

The chapters that follow are written by people who have led successful class fund-raising programs. Jan Strahler and Woodie Haskins explain the organization of class fund-raising volunteers or agents, their responsibilities, and the ingredients necessary for success. Strahler covers this subject from the college perspective, while Haskins views it from the independent school outlook. Russ Carpenter suggests using major class reunions as occasions for mini-capital campaigns. Bob Kallin explains one way to get an early start on class-associated fund raising -- a senior class reunion giving program.

Chapter 2

CLASS FUND RAISING: THE COLLEGE PERSPECTIVE

by Janet G. Strahler

With so many innovative fund-raising approaches to choose from, why raise funds through the class system? For those institutions that have used class fund raising for five or more years, the "why" is obvious: the results are worth the effort. Peer pressure and direct classmate contact, designed to capitalize on the special loyalty that alumni feel for their class and its members, increase dollar totals and are the only reliable way to increase the percentage of participation.

An established fund-raising maxim is that people give to people. Potential donors are most influenced by the people with whom they have shared an important period of their lives, by people whose success and social or business standing are exemplary and envied, and by people with whom they would like to be associated. What better place to satisfy these conditions than an institution's class-year structure? Combine these factors with well-organized fund raising, and success is inevitable.

As with any fund-raising program, potential pitfalls exist, and careful preliminary planning is essential. If, for example, the annual fund program involves a direct mail appeal followed by phonathon contact, identify precisely where and how a class-related program fits in. Consider, for instance, having a class representative solicit alumni first, with phonathon or direct mail contact later. Or, taking the reverse approach, the class contact can provide the wrap-up for the year, incorporating even the necessary follow-up on LYBUNTS.

Whatever your plan, the most important thing to remember in establishing a class fund program is to select volunteers carefully, instruct them well, work with them personally, and reward them generously with praise and recognition when they have done a good job (or even when things have failed to go well, as every volunteer occasionally meets a stone wall).

Organizing the class

There are several ways to organize a class for a fund-raising effort. The most traditional is through a head agent or class fund manager who recruits classmates to contact a selected number of peers -- preferably by phone, though sometimes by letter. This system is probably the most effective, particularly now that many institutions have data-processing systems that can record agent assignments and performance. Such a system enables staff to reward outstanding performances and to shift assignments when the solicitor/prospect match has not worked, steadily strengthen-

ing the program from year to year. A well-organized and well-oiled system requires several years to develop, though. Keeping the system productive requires one staff person to focus exclusively on the class program, particularly in a college or university with 15,000 or more alumni.

A variation on the agent system is to use the head agent or class fund manager to make initial contact through personalized letters. Use several types of letters to request certain gift levels, to remind the donors of matching gift opportunities through their companies, and, when a donor's giving history reflects the importance of a certain month in the year, to remind the donor of the usual annual gift and to suggest an increase.

These are but a few of the ways to personalize the letters. To improve this approach, the volunteer could have the letter typed on company, professional, or personal stationery so that curiosity will get the prospect inside the envelope before tossing it into the wastebasket. A letter personalized with the prospect's nickname gets more attention.

In sending out personalized appeals, keep in mind the standard guiding principles of effective solicitations. For example, the potential for success increases when a specific amount is requested, rather than just "a gift." Also, many prospects do not give simply because they are uncertain about what amount is acceptable, while others will give $25 per year for a lifetime because no one has ever asked them for more.

Follow up personalized solicitation letters with at least one personal phone call, which can be done as a group effort. Five to ten class volunteers could get together, using either campus phones or a class member's office phones, to ask their classmates for pledges. Class phonathons, which can be conducted more than once during the fund year, are particularly effective in the last few weeks of the fiscal year to encourage LYBUNTS to respond.

With any variation of the class fund system, make sure to identify and solicit donors for leadership gifts. To assist in this effort, class fund-raising volunteers review lists of their classmates, selecting those who they feel have the potential to contribute at a leadership level. Then identify the best solicitor to request the leadership gift. This exercise requires much time, so you may want to focus on only a few classes each year. Once obtained this information is valid for about three years before it should be updated. A periodic review is particularly important for alumni in class years with the greatest upward mobility and for classes whose members are near retirement age. A major reunion year is a logical time to appeal for an increase to a leadership gift level.

Training volunteers

To assure a successful and productive class program, carefully plan the instructional materials and methods to train volunteers. Volunteers are effective in direct ratio to the information and materials you provide.

Keep each volunteer's job as easy as possible. The volunteer is probably busy already, for the busier people are the best volunteers. Simple, clearly defined tasks will encourage volunteers to stay involved.

The two traditional methods to instruct volunteer workers are class fund manuals and workshops. Both are good approaches and can be adopted in a variety of combinations.

A workshop represents far more than an opportunity to instruct volunteers: it is also an opportunity for an exchange of ideas and information by experienced volunteers who can encourage newcomers. Humorous role-playing of personal and telephone solicitations can help to dispel inhibitions. The enthusiasm generated during a workshop can help a volunteer give good instructions to those he or she recruits later.

The workshop should include a pep talk by the national chairperson or by the president of your college or university. If your volunteers return to the campus for the workshop, you can brief them on what's new on campus and instill a sense of the special role they are playing in assuring the future welfare of the institution. Volunteers will be more motivated to work for a cause that they can see and believe in. If it proves difficult to include all of the volunteers in a campus workshop, consider taking the "mountain to Mohammed." Conduct one or two workshops in major metropolitan areas where you have a concentration of alumni fund volunteers. In such an off-campus setting, create an appropriate atmosphere by showing good slides or a film and having a well-known faculty member or trustee deliver the pep talk.

The class fund manual, which can be a handout at a workshop, should contain both how-to's and up-to-date information on the institution's student body, faculty, academic programs, and financial status. Because people will work for and give to successful ventures with which they take pride in having been involved, use the workshop and manual to provide volunteers with ammunition to provoke that pride.

Stimulating class fund raising

There are still other ways to stimulate the class fund-raising program. One way is to provoke competition between classes. The alumni association might present an annual award to the class that raises the most funds. This award could be a plaque prominently displayed on campus, perhaps in an alumni hall or alumni

house. Or you might present annual awards to outstanding volunteers. For example, a useful gift, such as bookends, penholders, trays, or a set of glasses, specially ordered and not available in the bookstore, could be presented to the head agent in (1) the class achieving the highest percentage of participation; (2) the class contributing the largest dollar total to the annual fund; and/or (3) the class demonstrating the most improvement over last year's performance. There are many variations on this idea, which can be implemented fairly inexpensively while still providing the incentive of recognition.

Another inexpensive but effective form of competition is to provide, through alumni publications or the annual report of gifts, special recognition for those classes whose performance was exemplary. Use the criteria mentioned above, expanded to include the most outstanding class in each decade to give the older classes a better chance to shine because they are not competing with the younger and larger classes of the post-World War II era. This type of publicity soon will result in volunteers measuring their class's performance against that of a rival class. This comparison provides a compelling "talking point" for letters and phonathon solicitations: the "We can't let the Class of '____ beat us again this year" theme.

Reunion fund efforts

Perhaps the most widely used technique to promote class giving is the special reunion year effort. Most traditional are the 25-, 45-, and 50-year fund drives, which usually raise money for a particular cause: a room in a new campus facility, a scholarship fund, etc. However, shifting the thrust of these efforts toward the annual fund, with flexibility to count all gifts made by classmates regardless of designation, will significantly broaden results and provide opportunities for gifts that will satisfy even the most finicky donors.

There are several different ways to approach reunion fund efforts. But, like well-organized class fund systems, they require staff time and tender, loving attention. Some institutions conduct a two- or three-year pledge campaign for the 45th and 50th reunions; others have a long-standing tradition of the 25th reunion fund as the culmination of payments by class members to a mutual fund over 25 years.

Some newer ways to approach the reunion fund effort may require less staff time and not involve several years of accounting for pledges and payments. Assume, for example, that the 25th reunion class targets the annual fund for its special effort. Here are some tips for a successful reunion fund effort:

1. Organize a committee to identify class members who have the potential to make leadership gifts. This identification and the solicitation that follows are important factors in assuring a

successful reunion fund effort. Select volunteer solicitors who have already donated at the gift level for which they are soliciting their classmates, and carefully consider assigning the appropriate solicitor to each prospect. Base the matching of solicitor with prospect on fraternity or sorority affiliation, shared business or professional interests, and the information that only class members can provide on friendships, roommates, teammates, etc. Within each class fund committee have a leadership gifts chairman -- someone who has earned the respect of the class and who can provide the volunteer leadership to make this phase of the fund drive a success.

2. Direct the next phase of the campaign at the next level of donors, to raise the sights of the $100-or-under contributors as high as possible. Any solicitation -- whether by letter, phone contact, or personal visit -- should include a specific dollar ask. Although the prospect may not give as much as requested, the contribution is likely to be larger than if no specific amount were mentioned.

3. Appeal to nondonors. Most alumni perceive the 25th reunion as a particularly special occasion, so even alumni who have not donated during the 25 years since graduation may want to reestablish contact with the institution and begin to donate.

The theme unifying all three levels of reunion solicitation is that the gift is what is important -- a special "stretch" gift for whatever designation best suits the donor, with particular emphasis on unrestricted gifts to the annual fund. These special efforts improve the percentage of participation, and provide good publicity for successful campaigns, perhaps through an announcement to alumni attending reunion events. Ample publicity in alumni publications should mention both the dollar figures and the volunteers who made the campaign a success.

Apply this same strategy to as many reunion classes as staff time permits. Develop themes around specific asks, such as "$15 for the 15th" to get nondonors on board. Phonathon appeals can incorporate the same kind of approach.

While not all reunion classes that undertake this kind of effort can greatly increase their total dollar results in one year, subsequent years often show steady increases both in dollars raised and in the percentage of participation. Making an effort with a class celebrating its 5th reunion, followed every five years with a similar campaign, could produce an impressive record by the time the class celebrates its 25th reunion, for example.

Class fund raising has multiple benefits: It is a successful method to raise funds and develop donor prospects, it provides grassroots training for the volunteers who make major development campaigns successful, and it strengthens relationships between professional staff and volunteer workers.

Chapter 3

USING CLASS AGENTS

by Sherwood C. Haskins, Jr.

Effective class agents and dedicated volunteers are key ingredients to a successful annual fund. It pays to carefully select a class agent, weighing all factors before making the final appointment.

Reviewing candidates' backgrounds

At an institution with an active alumni association and class officer program, the class president may select the class agent by reviewing candidates in conjunction with the alumni affairs and/or development office. Ideally, a potential class agent should already be active: serving as an admissions representative, coordinating an alumni activity, or participating in a regional alumni association, for example. Involvement in activities indicates a sincere interest in the institution's well-being. However, while it is tempting to recruit dependable old hands to serve in other areas, beware of over-extending volunteers.

Financial support of the institution is another critical characteristic of potential class agents. The most effective agents are committed to annual giving, as opposed to capital giving. There may be an overlap of those who have contributed regularly to annual giving and those who have supported other activities. A consistent donor to the alumni fund has demonstrated a commitment to the institution and established a credibility with his or her classmates important in the solicitation process.

Class presidents should also consider the involvement of potential volunteers when they were students. Classmates who held special positions or were active in student affairs during student years often generate better responses to their appeals. If a potential candidate was not well known, consider the reputation he or she may have developed with the class since graduation. Alumni who have received recognition from employment or public service earn credibility with classmates, which translates into greater effectiveness as agents.

New volunteers often participate in planning a major reunion. Class presidents should observe classmates who become active in reunions and may wish to further their involvement.

Another group from which potential agents and volunteers may come: alumni parents (alumni whose children now attend the

institution). They have unique perspectives on the institution's past as well as its present. Such volunteers have been "self educated" about the institution and are committed to sustaining its academic excellence. Although alumni parents may not be major donors since they're paying tuition, they possess the loyalty, confidence, and interest in the school that are essential. This is also true of alumni parents whose children have already graduated.

Another consideration in recruiting may be the geographical distribution of volunteers. If the constituency is national, broadening the agent program to key alumni areas will allow fund raising to take a national perspective, not one directed only within short distances of the school. While geographical distribution offers credibility to your program, those volunteers who can visit the school more often, participate in local phonathons and other school activities, will provide the greatest support.

Class agent responsibilities

Class agents' responsibilities have changed considerably in recent years. While agents once relied solely on two or three letters a year to the class to achieve maximum results, much more time and energy is now required. Don't underestimate the commitment when asking a volunteer to serve as class agent. Too often prospective agents hear: "It only involves writing a few letters." If you expect agents to become more deeply involved -- and you should -- explain it that way. Describe what your institution envisions the job to entail. Reviewing these expectations with the prospective agent before making a decision will avoid future problems.

Consider the following checklist of agent responsibilities common to many annual fund programs.

1. Letter writing. Effective letter writing throughout the year is essential to solicitation. Agents may author two to four class letters a year. Institutions with advanced word processing capabilities can provide a personal touch for all letters if desired. Generate solicitation letters in several categories: never givers, occasional givers, LYBUNTS, SYBUNTS, and regular donors. At the very least, agents should personally sign letters and attach a special note to each letter. One general letter to the entire class will not be effective enough. Agents should write individual letters to special gift prospects who provide a critical base of support each year. Donors appreciate this personal attention and their response will compensate for the extra effort. Each gift from this leadership group should be acknowledged by the agent as well as by the head of the school or appropriate development officer. Agents should also acknowledge all other gifts received during the campaign.

2. Phonathon attendance. With annual fund programs placing increasing emphasis on regional phonathons, class agents should be responsible for attending phonathons near their homes and for arranging class representation at phonathons in other locations. While some volunteers may be uncomfortable asking for money over the phone, this has proven to be an effective approach in securing new gifts and soliciting increased gifts from regular donors. Also, those classes well represented at phonathons often have the highest percent of participation in the fund each year.

3. Participation in school activities. Since class agents serve a public relations role for the institution, it is important for them to participate in activities such as regional dinners, reunions, and special events. Agents should be knowledgeable about the institution's current operation (admissions, faculty, finances, and college placement) and be aware of its needs so that they can be an appropriate resource for their classmates' questions.

4. Collecting information. Agents may also identify classmates' special interests and provide them with information on appropriate giving programs. Throughout the year, agents will gather information about classmates (job changes, business and address/telephone changes, births/deaths, and general feelings about the institution) and share it with the appropriate alumni or development office and with the class correspondent or secretary for the class notes portion of the alumni magazine.

Elements of success

In order for the agent to feel comfortable and confident, the development staff must thoroughly educate each volunteer about the institution. One effective way to educate and motivate agents is to invite them to visit the campus individually or, ideally, attend all-volunteer weekend, usually held in the fall. Volunteers can attend classes, visit with students and faculty, and meet with key administrators. The program should include a recognition segment to acknowledge all volunteers, particularly those who are most successful in a variety of categories. Another segment should discuss effective techniques and methods in the class campaign. A special program for newcomers may help answer questions and allow the staff an opportunity to stress the importance of the agent's role. Staff should provide each agent with a class agent manual or guidebook for the year's campaign. Compiled by the development staff, the manual should include a description of the class agent's role, a schedule of the upcoming campaign, sample letters, and other helpful suggestions. A thorough and well-organized handbook will stress the importance of the class agent's role from the institution's perspective.

Class agent programs are most successful at institutions that encourage class competition and class loyalty. Each class has its own dollar and percent of participation goal, and agents can

use friendly competition to motivate their classmates. This competition continues for all classes in non-reunion years, and is further heightened in reunion years. Surpassing the record of a previous reunion class is a major consideration for the class officers and the development staff in establishing reunion goals. Each successive reunion class will want to exceed the performance of a previous class or a long-standing reunion record.

Once the campaign has begun it is critical to inform agents regularly about the progress of their respective classes and the entire fund. Reports sent to agents may be biweekly, monthly, or bimonthly. The more frequent the report, the more likely that each agent will follow through effectively. Reports may also provide information on athletic teams, campus events, and alumni activities, which may help agents in writing class letters or in communicating directly with classmates. At the campaign's close, agents should receive a final report on the fund and their class's specific results. This is the time to recognize new records and superlative performances. It is important to end the campaign officially, thank the volunteers for their efforts, and invite them to attend the volunteer program if it is scheduled.

Organizational aspects

How long should a class agent serve? Generally, a class agent serves during non-reunion years, and a new volunteer chairs the reunion gift campaign, although in special circumstances a class agent may serve in both capacities. This format allows the agent a "sabbatical" from his or her responsibilites for a year. The reunion campaign usually occurs on a larger scale and with a different approach, so a new voice from the class can be particularly effective. The reunion gift chairman may ask the agent to serve on a reunion gift committee or as an adviser. The class officers, in conjunction with the development staff, should make these decisions. Once the reunion campaign has concluded, the class officers may reappoint the agent, or, in the case of a weaker agent, replace him or her.

Some agents serve several terms of office and perform extraordinarily. However, the signs of agent burnout are obvious and class officers should take immediate steps to alleviate this situation. This may require asking for help from other classmates. At schools with larger classes, as many as 20 class agents may be involved in the class campaign. It is seldom that an agent does not readily accept help from other classmates.

Agents are sometimes greatly relieved if the staff and class officers can offer a smooth transition in leadership. Each individual volunteered as a result of sincere interest in the institution and its well-being. If changes are in the best interest of the class and the institution, the volunteer will support these decisions.

In addition to the class agent program, it is worthwhile to form an annual giving advisory committee to oversee the many aspects of the ongoing campaign. The committee may meet three or four times a year to serve as a sounding board for the staff, to help in the organization of phonathons, to monitor and provide assistance to new agents, and to evaluate the campaign's overall progress. Such a group might consist of several of the most effective class agents and other volunteers who can provide a fresh perspective. Membership on the committee may also provide an ideal way to educate and evaluate prospective alumni fund chairs.

Critical to the success of any volunteer support program are the commitment and performance of its members and the understanding and support of the staff. A well-organized and enthusiastic campaign will provide a rewarding experience for the agents personally and will benefit the institution immeasurably. An effective class agent program can attain strong alumni support.

Chapter 4

THE CAPITAL REUNION FUND

by Russell F. Carpenter

If you could start at square one to redesign your reunion giving program, what would you do differently? Is it enough to use the reunion only to upgrade annual gifts from alumni?

Perhaps not. Suppose you chose the two major reunions, the 25th and 50th, to conduct mini-capital campaigns. Most likely, the reunion campaigns would generate more funds than the usual every-five-year upgrades.

What are the ingredients to launch a successful, well-managed mini-capital campaign?

1. Treat the entire class as a donor constituency. All the elements of a capital campaign apply: leadership, organization, schedules, goals and objectives, major and general gifts, and excitement. A successful mini-capital campaign is more than just a beefed-up annual giving effort. A class mini-capital campaign requires a solid foundation of annual giving experience and performance.

2. Inspire positive attitudes toward the institution. These attitudes are the product of years of conditioning. They do not occur overnight. Without them, you will face ignorance, disinterest, and weak support from your constituency. The willingness of alumni to work hard and to give generously must be based on an intellectual agreement with the institution, on an emotional response to its positive influences upon their lives, and on their appreciation for what it is today.

Inspiring this willingness will require a great deal of staff and volunteer time both before and during the campaign. Success depends upon a successful marketing effort to establish, or reestablish, a joyous sense of class association, an interest and pride in what the college is now, and yearning to return to campus to celebrate an important point of passage.

3. Select a class with the right potential of leaders, solicitors, and givers. It must also have the respect of other classes so that its challenge will stimulate them. Competition between classes is an essential motivating element.

If your class volunteers have the right leadership qualities, success will follow. Qualities of good leadership are no secret: respect from peers (for the right reasons), managerial talent, organizational aptitude, ability to communicate and motivate, willingness to delegate, sense of humor, and strong commitment.

Each class will want to create its own organization, schedule, and agenda, but will end up with pretty much the same one. That's as it should be. Each new class needs the adventure of finding its own path, making the old ways seem fresh and discovering some new ones to make its campaign distinctive. The staff is always present to provide direction and lessons learned from previous campaigns.

4. Invest the necessary staff and budget support. Volunteers must know that their time and talent is backed up by a institutional budget. You can economize by using donated services and materials, piggybacking trips, having volunteers take a tax deduction for expenses rather than a reimbursement. However, fund raising is a business, and doing business costs money. To skimp when your labor is free is counterproductive.

This principle applies also to staff and staff time. Don't wait until the actual reunion year to organize a 25th or 50th reunion class for a mini-campaign. Start planning at least two years in advance, so the organization can observe and learn from the preceding reunion class.

A mini-capital campaign forces the reunion class to adjust its organization and goals, as well as requiring considerably more time. Staff time and program budget must follow appropriately so the cultivation, scheduling, structure, and staffing flow smoothly.

The 25th and 50th reunion classes feel special. It is their year. They anticipate their special status and reality must outshine the expectation. Here, also, assign the appropriate budget, staff, and time. If it takes a red carpet, rent one!

5. Involve many class members in the reunion. Greater participation in all phases of the reunion equals greater class gift performance. Involve as many class members as possible in tasks large or small, short-term or continuing, planning or operational. If they can't (or won't) participate, at least they've been asked, maybe twice, and know what others are doing. The ideal reunion gift committee includes the institution's hardest workers and strongest supporters, and represents the class's most positive memories and its professional and geographic diversity. It is large enough to show intensive location and class involvement. The alumni fund class agent, or whoever heads other fund-raising activities by the class, is an essential member, but not the chairperson.

How many different, specific responsibilities can you find for volunteers? To start, there's the reunion committee which plans and manages the reunion itself. Then the need for one-person committees, augmented sensibly, is almost endless: welcoming, dinner, favors, children's programs, sports, lectures and seminars, name tags, tours, and so on. A yearbook committee

could publish an illustrated compendium of personal history, facts, and essays to reacquaint classmates and their spouses with each other. (This doubles as inexpensive and superb prospect research.)

The reunion gift committee plans and conducts the mini-capital campaign. It completes its work before the reunion, because two years of screenings, meetings, mailings, dinners and receptions, campus visits, and solicitation by phone and in person is sufficient to do the job without infringing upon the fun of reunion. The gift designation committee works with the institution to decide the purpose of the reunion gift.

Your goal is for each class member to participate, actively if possible, vicariously if not, in all aspects of the reunion -- and to have a good time doing so. Obtaining a commitment to attend the reunion may be almost as hard as obtaining a major gift. But if your investment of time and effort is made toward the goal of every classmate returning with family to campus for an enjoyable time, the funds will follow.

6. The reunion is greater than the sum of its parts. All the aspects of a class reunion could stand alone, but by planning, managing, and performing them together, they support and complement one another and a harmony swells.

How do you start? Look ahead to pick the right class because of its leadership, performance, and obvious sense of pride and family. Present the challenge and involve class members in developing plans for their response. Give them staff, budget, and access to the institution's leaders. Prepare the classes that follow to pick up the gauntlet. And, above all, make it fun.

Chapter 5

SENIOR CLASS REUNION GIFT PROGRAMS

by Robert J. Kallin

A senior class reunion gift program is an outstanding opportunity to educate future alumni about alumni support. Recruiting and motivating seniors to raise funds and to make donations will create a pool of young alumni ready to assume greater responsibilities in future capital and annual campaigns. These young alumni will already understand the relationship between alumni support and the prosperity of a university. Most importantly, the senior class reunion gift program can begin to educate seniors about their responsibilities as alumni and heighten their awareness of the institution's future needs. In addition, such a program can spotlight the need for support from all segments of the university constituency. It can demonstrate to alumni, parents, friends, corporations, and foundations that current graduates are committed to supporting the institution and willing to work hard to maintain its fiscal soundness.

Organizing the campaign

A senior class reunion gift program is an ambitious undertaking. Senior class members should organize, launch, and manage the program, building the campaign hierarchy themselves and contacting classmates for pledges according to a sequential pattern of solicitation. Approximately 20 percent of the class are active at lower levels of the campaign hierarchy. The development staff advises the seniors during the program's initial organization and pays expenses incurred while launching or administering the campaign.

The program's goal is to solicit 100 percent of the senior class. The key to success lies in detailed organization, faithful adherence to the campaign hierarchy, and tireless follow-up by student leaders.

The class president, in consultation with the development staff, should choose the program chairperson during the spring before the senior year. The chairperson then recruits key student leaders to form the steering committee. They should represent each major constituency on the campus (i.e., dormitory, fraternity, sorority, independent men and women). The chairperson also selects a publicity chairperson and an investment chairperson.

When the student leaders return to campus in the fall of their senior year they meet to confirm the campaign calendar. The university president hosts a dinner for them to demonstrate

support for the program. The steering committee spends September recruiting captains for each area of the campus; the captains, in turn, recruit one campaigner for every five of the remaining seniors on campus. Via a class-wide mailing the chairperson invites all seniors to participate; many students volunteer in response.

Later in the fall, the university president reiterates support for the program by hosting another reception for the campaign leaders. A week later, a comprehensive training session for all program volunteers occurs. The chairperson outlines the history and philosophy of the program and demonstrates effective and ineffective solicitation methods, often through role play. Campaign leaders distribute pledge cards and record assignments. Campaigners choose whom to solicit; experience has shown that when friends approach friends, the job tends to be completed quickly and effectively.

A kick-off dinner on campus, featuring an inspirational speech by a renowned alumnus, officially launches the progam. The president, local trustees, and administrators also attend, as well as all the campaign workers (i.e., chairperson, steering committee, captains, and campaigners.) The kick-off event assures the class that their campaign has the university's backing. Later that same evening, steering committee members inundate the campus with posters that bear the senior gift drive logo. Actual solicitations begin the next day.

Campaigners submit completed pledge cards during the next six weeks at a series of weekly luncheon meetings. The development officer does the actual record-keeping. The campaign usually concludes by December; sometimes it extends into the second semester, if necessary, for seniors who participate in off-campus studies during the first semester or for those who are late in completing their contacts.

The development office serves as headquarters for all reunion gift programs. An annual giving staff member supervises the schedules for the senior class and the other reunion gift programs. This staff member provides class chairpersons with monthly progress reports on their accounts. Occasionally, the staff makes recommendations to chairpersons regarding letter writing or class committee meetings.

Campaign finances

Approximately 30 percent of the program's budget is spent on the kick-off dinner, the two president's receptions, and class stationery bearing the senior gift drive logo. The remainder of the budget is consumed in postage, supplies, and duplicating expenses associated with contacting the other participating alumni classes.

Pledge payments are not due until the autumn after graduation. Pledges may be deferred until after an individual has started a job or completed graduate or professional school.

Each autumn every classmate who made a pledge to the reunion gift program receives a letter from the class chairperson as a reminder that payment is due before the end of the fiscal year. A pledge card indicating payments to date and the balance due accompanies this letter. Campaign leaders mail a second reminder later in the fiscal year to individuals who did not respond to the first letter. These mailings frequently include a list of matching gift corporations to spur participation in and awareness of matching gift programs. Accurate and timely pledge reminders are critical to success.

A class-appointed investment committee oversees the class account during a ten-year period. At the conclusion of the decade, participating class members vote to determine the designation of the gift.

Results of the program

The results of the senior class reunion gift program are extremely gratifying to both volunteers and staff. Involving so many volunteers in the institution's financial future has positive implications for its long-term growth and well-being.

A primary purpose of this program is to motivate younger alumni to make annual contributions. Some institutions continue to solicit for annual gifts during the pledge payout period of the senior gift campaign, while others defer annual fund solicitations until the completion of the senior gift program. If both programs run concurrently, take care to differentiate them. Use different letterheads, staggered solicitations and pledge reminders, and explicit written statements from both programs to clarify the difference between the annual fund and the senior class reunion program.

When both programs operate concurrently, overall participation rates among the ten classes involved can exceed the average alumni participation by 10 to 25 percentage points. Annual contributions to the senior class reunion gift program from the 10 participating classes can exceed gifts to the annual fund from the same group.

Another result is the active participation of selected classes in investment activities. During the 10-year program, class funds are held in a university quasi-endowment account. The investment chairperson for each class contacts the university finance office to help supervise the investment of accrued funds as determined by the class investment committee. They confirm investment strategies through meetings and conference calls.

The experience seniors gain during the program's launching ensures that they will be well-trained alumni volunteers in the future. The program also instills a sense of pride in classmates who work together toward a common goal.

A successful senior class reunion gift program contributes significantly to the institution's financial security. These programs are a major factor in meeting annual giving goals and funding capital projects

Different institutions can adapt the senior gift concept. If the institution already has an aggressive 10th reunion gift program, consider implementing the senior gift program on a one-, three-, or five-year basis. Some institutions have a fixed pledge payment, while others use a "step ladder" method of upgrading payments. For example, a total pledge of $150 would be $10 for the first year after graduation, $20 for the second year, and so on, up to $50 for the final year of a five-year program. Challenge gifts from the board of trustees or a nucleus of classmates can encourage increased participation and dollars.

In any gift program, success is measured by the institution's ability to educate and motivate alumni to help their alma mater. This goal can be accomplished by implementing a senior class reunion gift program.